



HAVAS
HEALTH
& YOU

Realities Edge

Trends 2023



Step into what's next.

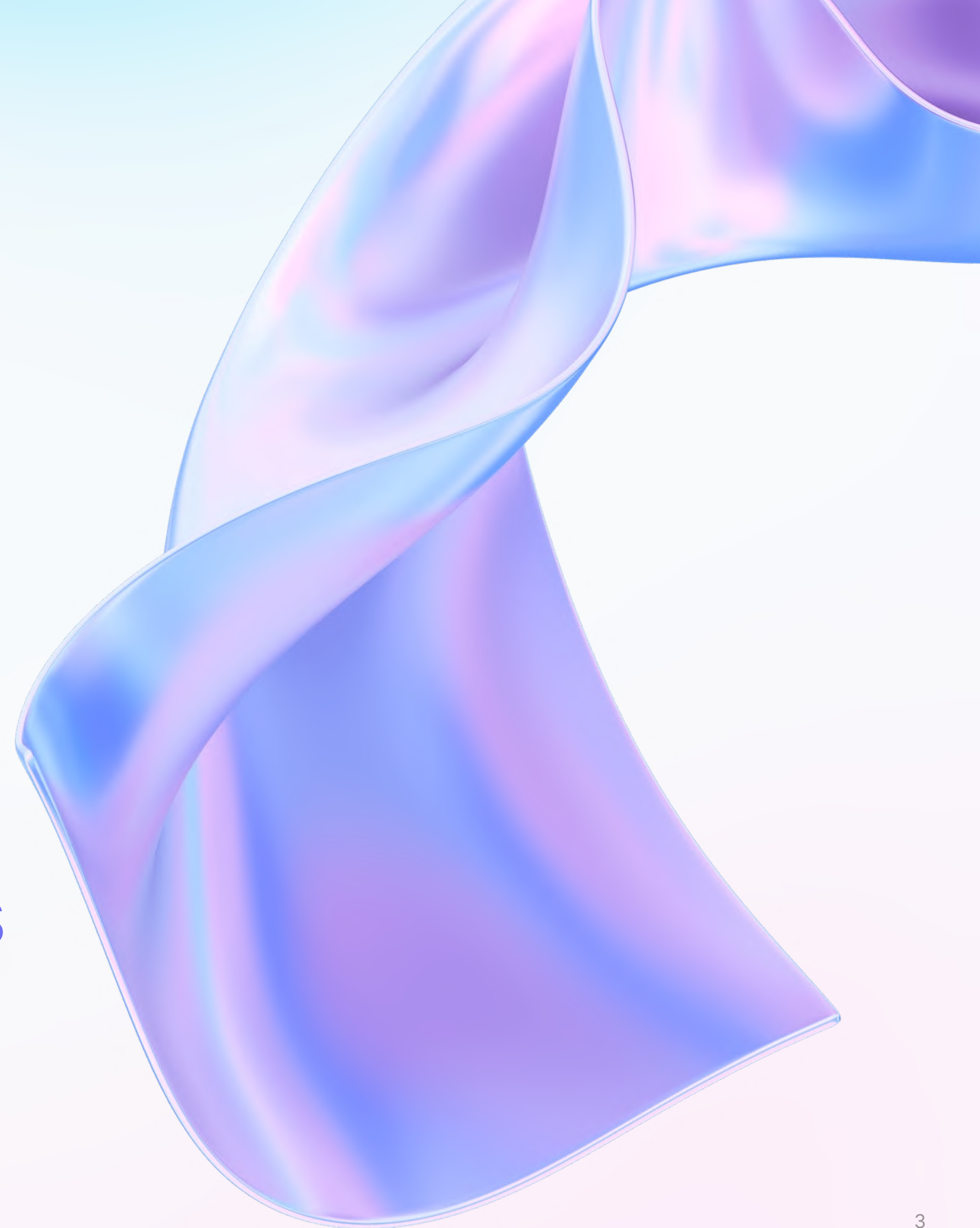
As we march into the new year, there are new and emerging trends with the power to redefine how we as a global collective interact across industries—health, wellness, and beyond. Now more than ever, we have a wider perspective on our individual selves. Realities are converging. Self-image has the power to subvert society's most shallow of standards. Thoughtful environments can positively impact our physical wellbeing. Accessible technologies can unlock our minds, bodies, and spirits in new and unfathomable ways. These evolutions of perception are just the beginning.

So join us. Treat *Realities Edge* as an exploration into how consumers are shifting their mindsets and purchase points to best reflect themselves, consciously and unconsciously. Over the next 48 pages, we'll be unpacking six emerging trends: how people represent, nourish, gratify, expand, surround, and equip themselves. Each study is a reflection of consumers pursuing their truest selves.

From Havas Mango of the Havas Health & You network, welcome to where our endless possibilities converge.

Table of Contents

PAGE 04	Beyond Wellbeings
PAGE 11	Intake + Uptake
PAGE 18	Seek to Peak
PAGE 25	Mindful Expansion
PAGE 33	Transformative Spaces
PAGE 40	Autonomous Self



TREND 01



Beyond Wellbeings

No longer limited by the physical world, we're free to express ourselves across emerging realms to establish our truest selves.

The lines between our digital and real-world identities are blurring as we spend more and more time online. The available platforms and avenues of self-expression continue to expand—allowing individuals to rewrite their identities and bypass societal constructs such as appearance, neurodiversity, gender, and more. People can now embody their most authentic selves, celebrating what makes them unique, instead of launching toward unrealistic standards.

Starting with the physical self, consumers are embracing the concept of *Body Neutrality*—we’re recognizing our bodies for ability over looks. This is a notable perspective shift from body positivity, and brands are taking notice to increase their offerings in this space. Countless fitness apps and platforms spotlight body diversity, their campaigns advance inclusion and adaptive products cater to the untapped market of people with disabilities, i.e. the UK’s “purple pound.” Studies estimate the disposable income of people with disabilities—including their allies—at \$13 trillion. In parallel, efforts to advance digital accessibility are making their way into the agendas of public and private organizations, bringing a much-needed examination of the barriers that underrepresented audiences are forced to hurdle.

Groups such as **People of Crypto Lab** are actively working to build a more inclusive version of the web to ensure "*the advancement of black and brown women, LGBTQIA+, differently-abled, and POC individuals across Web3.*"

With the collective redefinition of identity and the emergence of our virtual personas via avatar, the demand for assets and ways to express ourselves continues to expand. One indication is the rise of the *Affirmative Avatars* market—which is fueling a more diverse offering in digital fashion, avatars characteristics, 3D models, and even stickers such as **Bitmojis**, which have worked with the disability community to represent wheelchair users. This emerging *Direct-to-Avatar (D2A)* economy, as defined by tech-futurist and metaverse expert Cathy Hackl, is the natural evolution of the direct-to-consumer model and an opportunity for brands to level up and meet the demands of a new type of consumer—one whose life is as physical as it is virtual.

TRAJECTORY 01 Meta Diversity

Big tech has long had issues with communities requesting diversity and representation. White workers make up sixty-two (62%) of the tech workforce—but while we see branded efforts to balance the equation, it's still an uphill battle for minority groups. In response, creators in the Web3 space are launching initiatives to offer full avatar customization to provide the most accurate representation.

Genies is creating an open and decentralized ecosystem of assets for multiple metaverse platforms. They plan to include avatars, fashion, spaces, social experiences, and other 3D assets, all to give creators full ownership and commercialization rights to their creations.

TRAJECTORY 02 Disability Visibility

Fifteen percent (15%) of the world's population lives with some sort of disability—yet inclusive design is overlooked across industries. Only two percent (2%) of the world's websites are accessible. In the real world, products for people with disabilities are lacking, especially in regard to fashion.





In an effort to fight ableism, **Adaptista**, an accessible e-commerce platform, launched one of the first inclusive fashion lines. Inspired by the personal experience of its founder and CEO, Maria O’Sullivan-Abeyratne who has ADHD and ankylosing spondylitis, Adaptista brings adaptive fashion to market while supporting disabled-led brands.

TRAJECTORY 03 Inclusive Wellness

“Rest is a form of resistance” reads the manifesto of activist writer and poet, Tricia Hersey. This idea, centered around dismantling capitalism and hustle culture, has been central to offering a different self-care experience for Black, Latina, and non-binary groups. Acknowledging the need for inclusive spaces to reflect, reset, and be seen—Planned Parenthood created **TONE**, a curated playlist of meditations, self-care wisdom, affirmations, and conversations that are as inviting as they are relevant for all audiences. The organization believes the project is a wellness tool that *“connects self-care to sexual health care and helps ease the burnout that we all feel in the moment.”*

Future Points & Percentages



52%

of GenZ feel more like “themselves” in the metaverse than IRL

RAZORFISH x VICE MEDIA



97%

of home pages had detected WCAG 2 failures


webAIM



63%

of people make purchase decisions based on brand accessibility

WUNDERMAN THOMPSON



“The notion of identity has evolved. There is no longer a line between the physical and digital ‘us.’ Identity is about expression—what we like, what we care about, what we stand for. We do it on the streets, on social media, in video games. We do it through our clothes, through posts, filters and avatars, through wearing our fandom on our sleeves.”

CHARLIE COHEN, TECHWEAR DESIGNER

Path/s Forward

Is your brand compatible with the evolving concepts of identity, representation, and belonging? Do your products and services welcome all people of all backgrounds—or are you inadvertently excluding audiences that weren't considered?

Conduct an audit of your brand's footprint in the physical and digital spaces to understand how different touchpoints might elicit different interactions from different people. Proactively plan for inclusion from the start instead of approaching it as an afterthought; avoid performative marketing.

TAKEAWAY

Brands that authentically support consumers as they explore their identity, both physically and virtually, will have a competitive advantage.

TREND 02



Intake + Uptake

Care for the whole self; beyond fitness-as-expected, we must consume intelligently, sleep properly, and maintain our mental health.

The food and beverage industry has evolved with consumer demand over the last decade, adding the desired tastes and products we've learned to want including functional foods and sustainable nutrition. Innovation is in constant demand and brands now more than ever must answer to natural and organic processes and enhanced product engineering for mood and lifestyle benefits, all without making too large of an environmental impact.

Our society is one of multitaskers—time is scarce and convenience is key. For better nutrition, fast, functional food is a healthy option. You might be surprised to hear it, but most vitamins are synthetically formulated. That might sound strange as sales of organic products in the US ascend to new heights year over year, surpassing \$62 billion before the pandemic. Thanks to advancements in ingredient discovery and extraction techniques, companies have been working to derive more extracts from nature, priming the functional food and beverage market to hit \$529 billion by 2028. Consumers now actively desire benefits linked to mental health in their foods and beverages, especially among younger age groups.

Currently, there's a boom in products featuring ingredients like "*nootropics*" and "*adaptogens*," as well as beverage startups linking their products to NFTs, furthering their brands through community.

Mental health is also the key to advancements in sleep and sleep technology in the US market. Insomnia has grown into a prevalent sleep disorder, leading to mass adoption of sleep monitors and smartwatches to increase the hours and quality of shut-eye.

The demand for data tracking and patterns via strict monitorization has soared, with US sleep technology (specifically devices) expected to grow at a substantial CAGR of seventeen percent (17%) through 2027, thanks to the help of key brands like **Oura Ring**, **Dreem**, and **Fitbit**.

TRAJECTORY 01 Micros/Macros

Products have a dual role in delivering taste and health halos in areas like immunity, digestive health, energy, stress, sleep, and cognition—partly based on the rise of Gen Z consumers' health-conscious behavior. Venice-based **Leisure Project** is targeting creatives with an emphasis on community development. The startup, which bills itself as "*the world's first co-created beverage brand*," hopes to market a kind of natural Gatorade to entrepreneurs, creators, and innovators. Leisure Project is in its early stages, but its founders hope establishing buy-in through NFTs and social platforms like Discord will help build an authentic community for their brand and give them a vital advantage over established competitors.

TRAJECTORY 02 The MetaverZZZ

If you're working remotely with a stark time difference between your home and office, **Timeshifter** doesn't just manage your jet leg, but offers an entirely new way for shift workers to optimize sleep, alertness, health, and quality of life.



Leisure Project NFT





This app is used remotely by astronauts. Dream worlds are even popping up in **Meta's Horizon Worlds**, where avatars must don pajamas to enter this immersive experience. While the immersive platforms continue to evolve, what they lack in immediate health benefits they make up for in communities and sleep experiences.

TRAJECTORY 03 Considerable Consumption

The rise of sustainability in nutrition is mindful to our planet and its people. Fortunately, companies like **Lundberg** and **Patagonia Provisions** are changing their processes to step onto a sustainable path. According to the Food and Agriculture Organization of the United Nations — if we continue to degrade our soil, Earth has only 60 harvests left. Although agriculture is the least-digitized industry sector in the world, there is an opportunity to help their complicated supply chains, and the size of blockchain innovations in the agriculture market is expected to grow from \$41.2 million in 2017 to nearly \$430 million by 2023 and encompass ~150 startups. Start with **AgriChain**, a blockchain company enabling peer-to-peer agricultural transactions while cutting out intermediaries.

Future Points & Percentages

\$216_B

estimated value of the nutraceuticals and botanicals market by 2025

TECHNAVIO

\$67_B

estimated market value of the sleep tech devices market by 2030

GLOBAL MARKET INSIGHTS

+47.8%

CAGR in agricultural market blockchain innovations

STARTUS INSIGHTS



“Increased awareness about the importance of good quality sleep, along with a healthy diet and regular physical activity, can act to promote good mental health among young adults. These can be thought of as three pillars of health, which each contribute to optimal wellbeing among young adults.”

SHAY-RUBY WICKHAM, LEAD RESEARCHER, UNIVERSITY OF OTAGO, NEW ZEALAND

Path/s Forward

Does your brand align with some of the concepts mentioned above, i.e., sustainability and thoughtful innovation? Do your products and services lend to physical improvement in the seemingly intangible, like sleep and nutrition?

Moods, foods, and sleep quality are intrinsically intertwined, each able to affect the other. When stocking shelves, brands must tune into the habits of newly health-conscious customers across all age ranges. Consumers want functional benefits from their favorite food and beverages. They prioritize clean labels, sustainability, and transparency. Ultimately, what's good for the planet is good for us.

TAKEAWAY

Brands that benefit from the growing sleep tech market should consider planning for evolving work settings (think metaverse)—but don't bet on sleeping in clunky headsets.



Seek to Peak

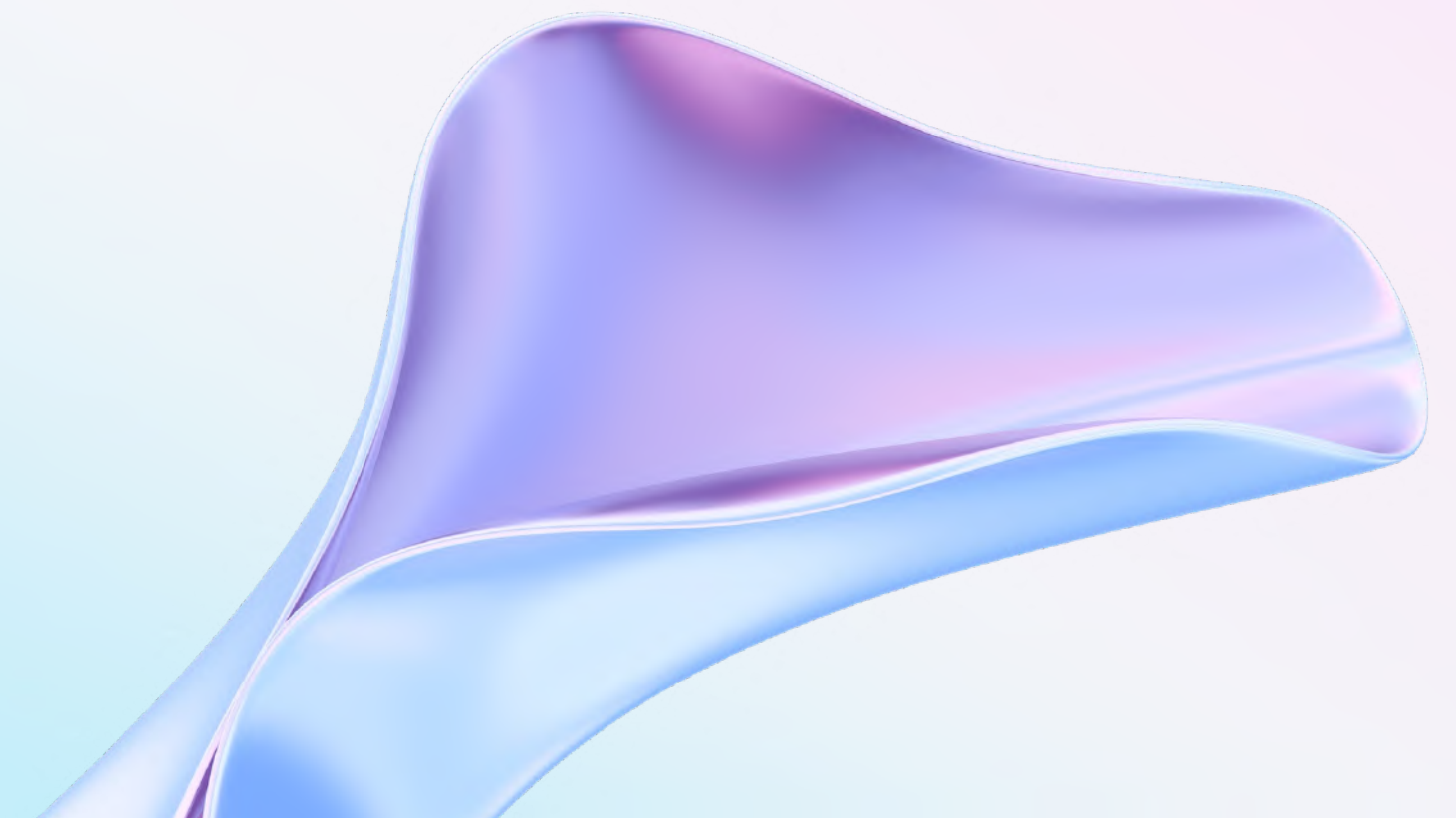
Global connectivity has launched taboos into the mainstream, shifting artificial intimacy, pleasure education, and wearable tech into the self-care realm.

Sex-positive movements have helped clear the stereotypes related to gender, orientation, sexuality, and even age. Movements like adaptive sex are stripping away (pun intended) harmful connotations that many have accepted over the years to open up sexual wellness to everyone.

Recently, The National Coalition for Sexual Health launched its "*Guide to Sexual Concerns and Pleasure*," promoting a sex life that transcends age, gender identity, race or ethnicity, sexual orientation, socioeconomic status, or physical and mental ability. This guide states that orgasms have become so vital to our existence that the World Health Organization deems sexual pleasure a fundamental right.

Only 1% of the \$80.7 billion sex toy market serves those with health barriers and disabilities, leaving new startups like **Bump'n** and **Hot Octopuss** to fill the gap.

As society becomes more open to sex education and alternative forms of sexuality, platforms like **Blueheart**, an artificial intelligence sex therapy, guide these conversations without stigma; educating people to live authentically while prioritizing their sexual wellbeing. There are a great many advancements at play, and women's health hasn't been lost between the sheets. Women account for eighty percent (80%) of consumer purchasing decisions in the healthcare industry, yet women's health is often considered a subset of the larger healthcare industry. With the overturning of Roe v. Wade, women are turning to digital tools to manage their bodies and cycles, welcoming a resurgence of hormonal health. New apps and programs put users in control of their daily functions and critical life milestones.

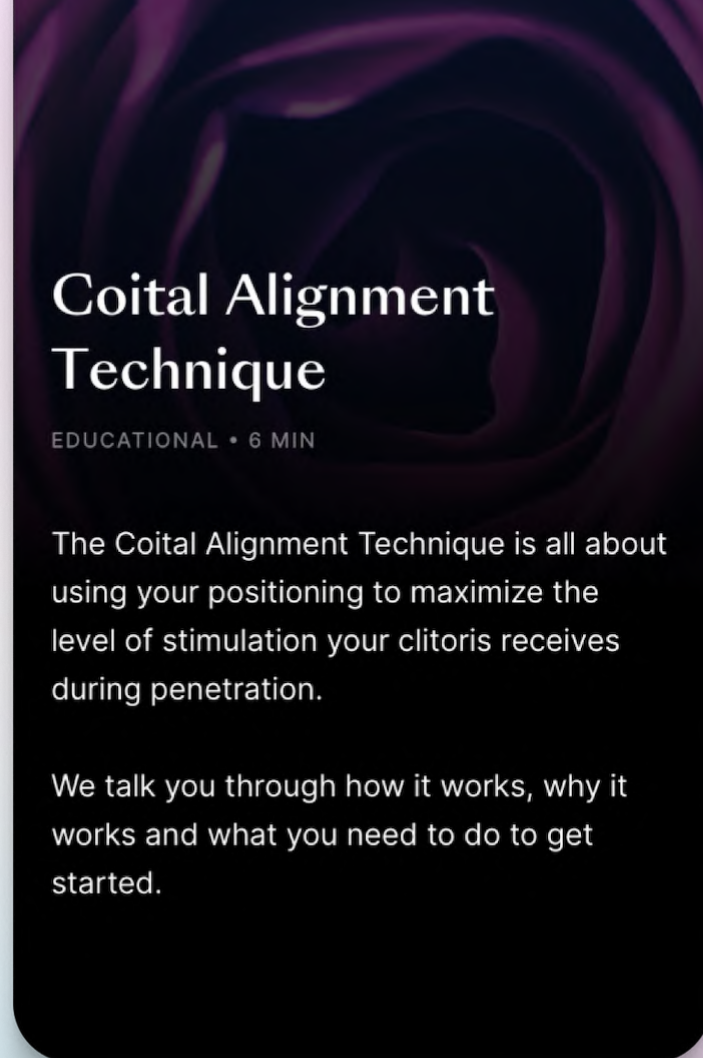


TRAJECTORY 01 Pocket Pleasure

According to sexpert Angie Rowntree, founder of the female erotica site **Sssh.com**, consumers are embracing shame-free self-pleasure. Luxury toy brands like **Maude** and **Lora DiCarlo** are going mainstream with celebrity endorsements and more people are freely discussing their solo-love habits. For those seeking emotion, **Replika** users believe their AI companions/chatbots have come to life. And, **Bump'n** is on a mission to shatter the barriers to sexual pleasure by creating sex toys by and for those with disabilities.

TRAJECTORY 02 Sexpert Apps

Lover is a digital therapeutic for improving users' sex lives and treating sexual problems. It's the first sex therapy app granted FDA approval. Every exercise in the program is written and scientifically proven by qualified healthcare professionals, leaving eighty seven percent (87%) of users to report improvements post-Lover.



Coital Alignment Technique
EDUCATIONAL • 6 MIN

The Coital Alignment Technique is all about using your positioning to maximize the level of stimulation your clitoris receives during penetration.

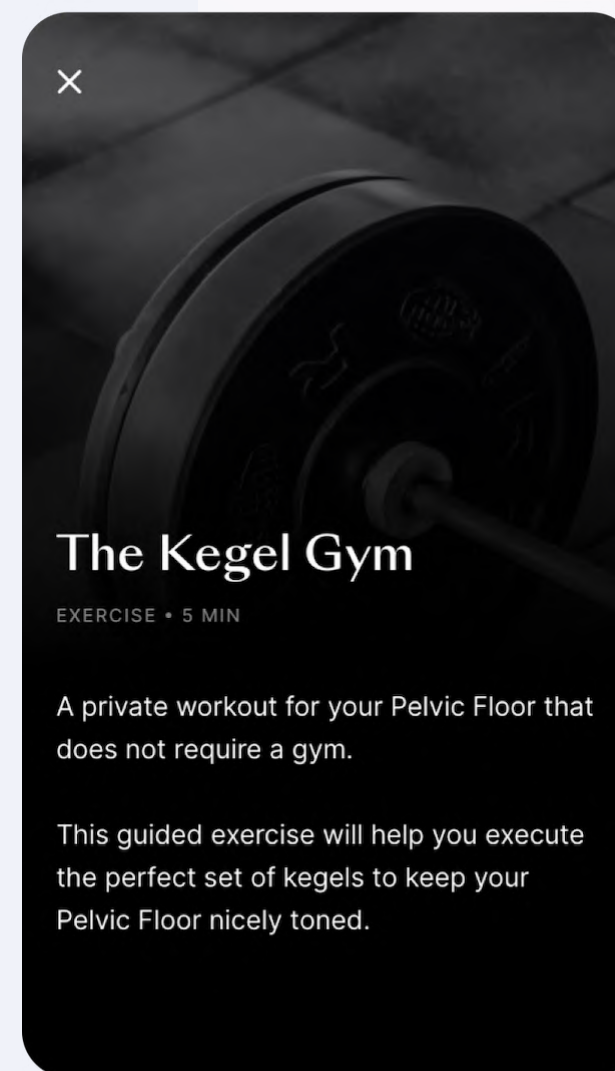
We talk you through how it works, why it works and what you need to do to get started.



The Vulva Tour
EDUCATIONAL • 5 MIN

In 2004 it was proven that "a tactical exploration of the vulva" was effective helping women orgasm more easily during sex. So we designed an exercise to help you do exactly that.

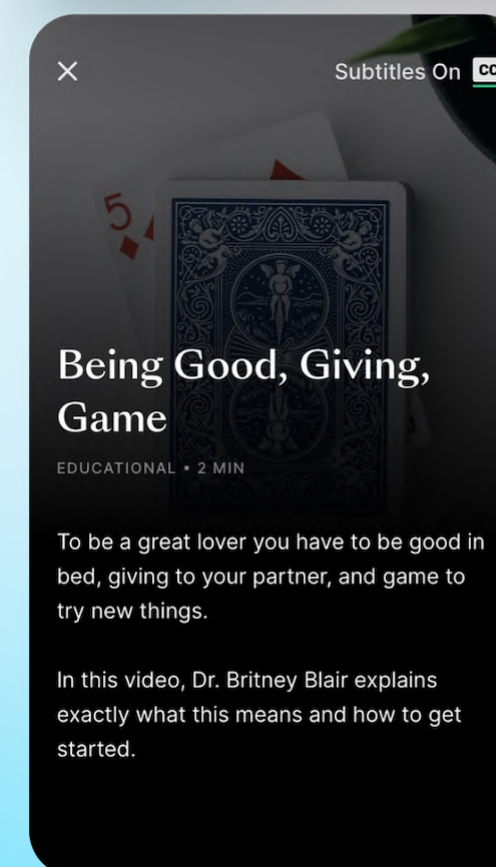
The Vulva Tour is a step-by-step, illustrated guide to the vulva. So the next time something feels good, you'll know it feels good and how to make it feel even better.



The Kegel Gym
EXERCISE • 5 MIN

A private workout for your Pelvic Floor that does not require a gym.

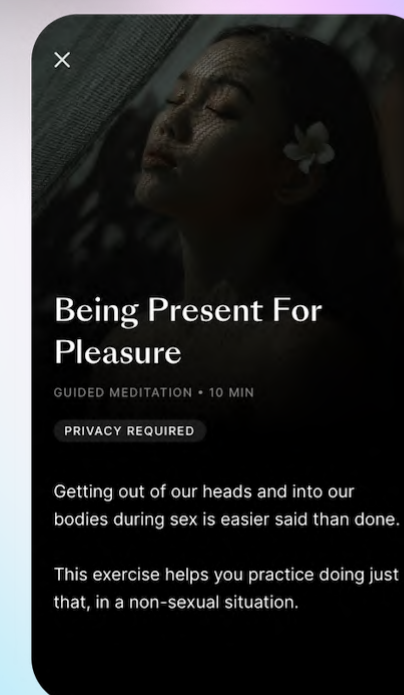
This guided exercise will help you execute the perfect set of kegels to keep your Pelvic Floor nicely toned.



Being Good, Giving, Game
EDUCATIONAL • 2 MIN

To be a great lover you have to be good in bed, giving to your partner, and game to try new things.

In this video, Dr. Britney Blair explains exactly what this means and how to get started.



Being Present For Pleasure
GUIDED MEDITATION • 10 MIN
PRIVACY REQUIRED

Getting out of our heads and into our bodies during sex is easier said than done.

This exercise helps you practice doing just that, in a non-sexual situation.



TRAJECTORY 03 Cycle Syncing

Feel like sometimes you answer to your hormones? It's not your imagination; hormones influence physical and mental health from depression to premenstrual dysphoric disorder and beyond. With oral birth control use declining as women question the mental health side effects, an emerging trend called *Cycle Syncing* matches your lifestyle to your menstrual cycle, and apps like **MyFlo** help. To stop endocrine disruption, relief can be found in hormonal creams and vitamins like **FLO**, which raised \$1.2 million in funding after experiencing 10x year-over-year revenue growth.

Future Points & Percentages

\$37.2B

estimated value of the sexual wellness market by 2023

STATISTA

50%

of the physically disabled have difficulty self-pleasuring

BODY + SOUL

80%

of consumer purchasing decisions are made by women

MCKINSEY & COMPANY

“We surveyed Reddit and found that of the 100 people we polled, 92 said they wanted an inclusive sex toy.”

ANDREW GURZA, BUMP'N CO-FOUNDER

Path/s Forward

The sexual health sector is evolving rapidly—before you push your brand to the deep end, ask yourself how it can authentically add to the space? Are you in the audience you’re targeting? If not, are you partnering with members to co-create for authenticity? Move the fringe, not the cringe.

Digital communities have the potential to grow larger and more passionate than many real-life audiences. As virtual resources and platforms continue to unite consumers across a wide range of demographics and needs, these communities can inform and advise separate from brand partners.

TAKEAWAY

The companies and organizations that prioritize these niche and underserved audiences in the long run will establish and maintain an authentic relevance in the space, especially as consumers spend more time exploring their physical and digital pleasures.



Mindful Expansion

Interest in alternative medicine has catapulted interest in experiential and psychedelic-enhanced remedies, bringing all-new answers to age-old problems.

We're living in the middle of an *Experience Renaissance*—immersive multimedia installations, branded pop-ups, *phygital* events, metaverse fashion weeks, selfie museums, VR conference booths—and all things experiential are having their moment. After a long period of sensory deprivation due to confinement and public health concerns, consumers are eager to dive into experiences that are inspiring, unique, and above all, transformational.



With renewed interest toward introspection, people are searching for opportunities that serve as conduits for self-exploration. Mood boosting or the intentional alteration of emotional states is a trend shaping the experiences brands offer their followers. Mood boosting is already taking shape as public healing spaces such as the **Mandala Lab at the Rubin Museum** in New York City, sensory reset immersion rooms from **Mycoocoon**, mood-boosting applications like **Happify**, and VR-based experiences built by **TRIPP**.

Beyond these stimuli, there's growing public interest to venture into deeper states with the help of mind-altering substances. Psychedelics.

The slow but steady growth of psychedelic-assisted treatments has been gaining momentum and is ready to go mainstream due to recent FDA breakthrough designations and consumer demand for alternative medicine.

Experts estimate the market for psychedelic healthcare to hit \$10 billion by 2027, and that's just the tip of the iceberg. States like Oregon are rapidly seeking to administer and regulate Psilocybin (mushrooms) with refined psychotropic-enhanced immersive wellness offerings ready to hit the market. While the conversation around mood-altering substances is a trending topic—the industry is still in need of universal guidelines, legislative reform, and a unified standard of care. Nonetheless, 2023 is expected to be a turning point for the group of Schedule I Drugs like Psilocybin, MDMA, LSD, and Ketamine in terms of FDA approval and treatment democratization.

As more people seek mood-altering experiences and to stimulate their senses to support their inward journeys, brands have an opportunity to offer micro-moments that offer true transformational value.

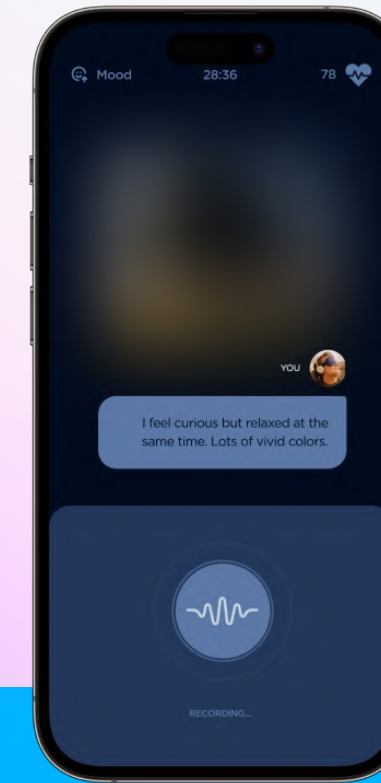


TRAJECTORY 01 Altered States

The increasing demand for mental health support has given nontraditional treatments a market advantage. Ketamine-assisted therapy providers like **Field Trip** offer physical locations across the US and Canada, while telehealth platform **nue.life** offers treatments from the comfort of your home. Both offer holistic treatments for patients experiencing depression, anxiety, PTSD, and treatment-resistant mental health conditions. Their programs even include an initial consultation to determine eligibility, support from their medical team, guided Ketamine experiences (in-person or remote), active monitoring, health coaching, and even group integration sessions.

TRAJECTORY 02 Curated Reset

Detox has been redefined, see *Reset Rituals*. A common practice among rituals is establishing time limits on habits; like focusing on specific tasks, disconnecting from technology, or reorganizing personal spaces. These rituals have gained traction on social media with people sharing their *#Sundayreset* routines as inspiration for TikTok videos.





Resonate has turned the reset idea into a tastefully designed, turn-key home solution; featuring a vibrating chair for meditation, light vision glasses for brain stimulation, headphones equipped with spatial sound technology, and a mobile app companion for curated content. According to Resonate, its experiences are built using neural entrainment science and proprietary technology.

TRAJECTORY 03 Conscious Immersion

An estimated 58 million Americans experienced virtual reality (VR) in 2022. The recent launch of Meta Quest Pro, combined with the anticipated release of Apple's extended reality headset in early 2023, could possibly double VR adoption in the coming months. To avoid the stress of the metaverse newcomers spend some time in **Maloka**, an immersive VR meditation experience. Thoughtfully designed to help people meditate regularly, the gamified experience sets users on their own island, each customizing their own space while discovering new meditation techniques. Partnering with renowned meditation experts, Maloka brings mindfulness to virtual reality and Web3; just look for their "*Mindful Metaverse Manifesto*."

Future Points & Percentages



estimated worth of the global alternative healthcare market in 2027

GRAND VIEW RESEARCH



projected value of the IRL/location-based experiential market by 2023

STORYTECH



forecast growth of the global mindfulness mediation apps market size by 2027

BUSINESS WIRE

“Retailers want to be part of the healing process of its customers. When done authentically, it can significantly elevate the brand recall from superficial to transformational.”

**VALÉRIE CORCIAS, CEO & CO-FOUNDER AT MYCOOCOON
COLOUR WELL-BEING EXPERT & CO-FOUNDER BRAINBO APP**

Path/s Forward

Think about how a key interaction with your audience can go beyond transactional and become a chance to transform their state or stimulate their senses. Can your brand turn each touchpoint into a mini-experience that advances your users' wellbeing?

The Experience Economy has the power to infuse much needed energy into the health and wellness industry, potentially supercharging brand ecosystems and CX journeys. Think about how you might extend your brand's presence beyond core business offerings. For example, if your brand is in the chronic pain space, can you design an experience to help patients cope with their condition, maybe boosting their mood at different stages of their treatment journey.

TAKEAWAY

Brands that can inspire feelings have a chance to cultivate a loyal following.





Transformative Spaces

Public and private spaces are being technologically augmented, luring people from their homes into unfathomable experiences in nature, fantasy, and more.

Brick and mortar retail, fitness, and hospitality brands are reimagining their spaces to be more engaging, sensory, and sustainable. Hyperphysical retail pulls concepts right out of the collective imagination—tactile materials, robotic automation, and now legacy locations—a macrotrend highlighting the senses through snappable experiences, all triggered with a wave of the finger. Fifty million people around the world consider themselves influencers or creators—they're spending despite inflation.

LVMH posted an €18B euro, a twenty nine percent (29%) increase in Q1 2022. Figures are standing firm, according to the US Commerce Department. Part of the global desire to spend is due to consumers' desire to interact in new environments after long periods of restrictions.

Where sensory experiences funnel into tap transactions, other retailers are turning down the noise, some adding quiet hours to make shopping more enjoyable, approachable, and inclusive for neurodiverse customers. The US has an estimated 116K malls that generate \$5T per year, yet twenty percent (20%) of Americans suffer from health challenges that inhibit their access to those locations.

Nature is also providing a backdrop to wellness through recognized biophilic design. The lines between our internal and external environments blurred after spending years cooped up in quarantine.

Since gyms were closed, nature became an extension of our fitness habitats, reminding us that connecting with the natural world offers health benefits. A recent study found that over seventy four percent (74%) of participants reported reduced negative moods and over eighty percent (80%) reported increased connections to nature. In the midst of reconfiguring our new normal, wellness is categorically taking over travel. The Global Wellness Institute predicts wellness travel will expand to \$1.1T by 2025, increasing twenty one percent (21%) YOY. In comparison, the sector shrunk thirty nine percent (39%) to \$436B in 2020. New traveler values are emerging; quests for nature, human connection, sustainability, and mental wellness—values paired with pent-up demand not just for travel, but social healing.

TRAJECTORY 01 Spaces for Body & Mind

As more consumers experience virtual landscapes, brands from Jacquemus to Balenciaga are going hyperphysical. Leading customers to brick-and-mortar stores generates sales and serves up new buzz-worthy experiences, adding a greater sense of meaning to *Retail Therapy*. Also, many modern stores feature bright lights and crowded spaces—an uncomfortable experience for all, especially those with mental health barriers. Zen-like shopping malls such as **Burdifilek** in Seoul create a new, relaxed experience. Quiet periods are also becoming more common in British shops like **Selfridges**—voted the “*Best Department Store in the World*” multiple times by Intercontinental Group of Department Stores.

TRAJECTORY 02 Green Exercise & Interiors

Nature impacts our mental and physical wellbeing. This fundamental insight is behind the biophilia hypothesis stating humans co-evolved with the Earth. Biophilic design and fitness—you’ll see it in **BioFit Gym**



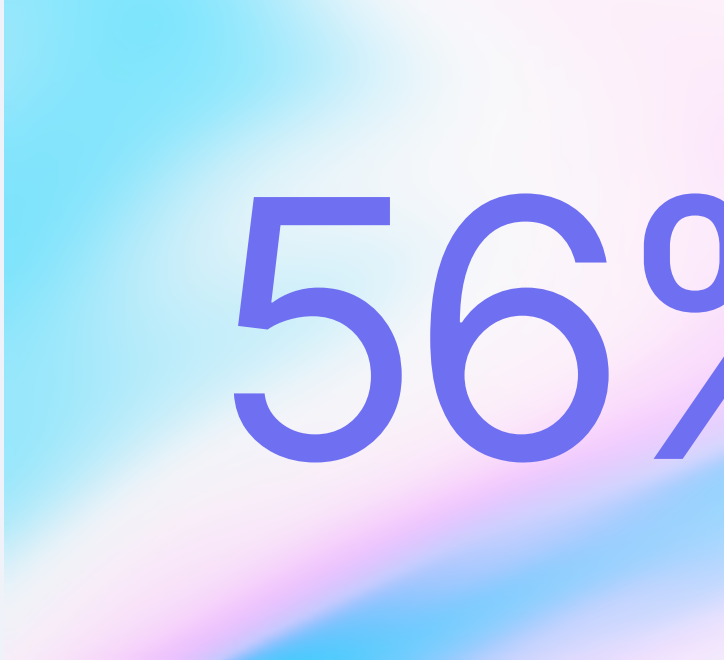


London and **MY MODE by Tracy Anderson** are programs centered in outdoor environments to promote green health benefits. Research shows exposure to the natural world can reduce stress, increase cognitive function, improve mood, and enhance creativity. These implications are the pillars on which biophilia's “essential” status is tethered to nature.

TRAJECTORY 03 Immersive Retreats

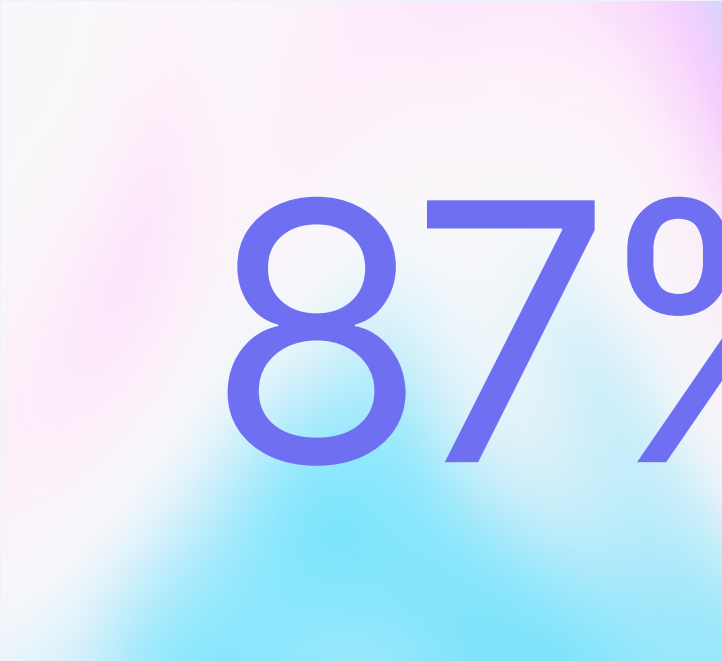
Times of disruption create a human sense of craving to reconnect with oneself. This desire paired with a focus on shared *rituals*, including sunset ceremonies and *sound sensoramas*, emerge in the wellness travel space with sustainable hotel sanctuaries like **Habitas AIUla** in Saudi Arabia. The dramatic splendor of ancient human creations unite like-minded travelers from all over to prioritize connection over the traditional concept of luxury. Habitas inspires purpose-driven travel, focusing not on materialism but on immersion into the natural environment and centuries-old regional culture.

Future Points & Percentages



of Gen Z prefer physical shops offering Instagram and TikTok experiences

IBM AND THE NATIONAL RETAIL FEDERATION




report feeling an improvement in mood after green exercise

BIOFIT



of travelers say they will make eco-friendlier decisions in 2022

THE VACATIONER



"It's not just about buying, it's also an experience, a concept. The idea is to break boundaries in the world of luxury. We want you to feel welcome and have a great experience, whatever you do inside. You can even walk in and take a photo."

SIMON PORTE JACQUEMUS, FOUNDER OF JACQUEMUS

Path/s Forward

Run a few searches around brands that are redefining the brick-and-mortar experience. How are these physical or digital experiences interactive, shareable, and most importantly interesting? Forget aspirational—are any of these brands your competitors? After this medium dive, think about how you can create a uniquely “you” experience that will gather interest from outlier customers—not your diehards.

Brands that go beyond shelves of neatly arranged products have the opportunity to transport shoppers into experiences far more immersive and imaginative than a typical big-box store. The greater the experience and the more ways it's shared with the public (leverage influencers) lead to online audiences seeing the success and wanting to join in. As consumers become more vocal about their shopping preferences, brands must be mindful that the one-size-fits-all approach hasn't been relevant in decades. A multitude of different consumers have varying needs and they expect brands to cater to them in adaptable and inclusive ways beyond topical representation. As people get more and more comfortable returning to the world, they are returning with a new set of values, with their wellbeing ranking near the top.

TAKEAWAY

Brands need to keep in mind that consumers are looking to be stimulated, connected through purpose, and offered memorable surprise-and-delight experiences that are more than just a checkout aisle.



The Autonomous Self

Wearables allow users to capture data at an unimaginable level, then AI and machine learning decipher this insurmountable wave of information into action.

It's time to upgrade your personal operating system and greet your interconnected self. Powered by developments in artificial intelligence (AI), wearable tech, predictive diagnosis, data-rich tracking applications, genetics testing, and other breakthrough advances—we've entered the next wave of health empowerment.

The last two years forced the healthcare sector to emerge from decades of legacy systems, demanding rapid investment toward digital maturity, especially around remote operations and access to care. As we entered the global lockdown, we saw inexperienced consumers and providers become early adopters and embrace telehealth in an unprecedented way. One pandemic later, the world is ready to move toward a more integrated version of health, one that leverages technology to make our lives healthier by design.

This approach is gaining rapid traction in the space of mental health, particularly with the proliferation of *Digital Therapeutics (DTx)* given the regulatory acceleration of clearances in this space.

DTx are evidence-based therapeutic interventions driven via software to prevent, manage, or treat a medical condition.



NYTimes, Illustration by Deanne Cheuk

While a majority of digital therapeutics in the market are focused on the treatment of anxiety and depression through Cognitive Behavioral Therapy (CBT) techniques, we are seeing the product offer expand to other conditions such as insomnia (**Somryst**), substance abuse (**Pear Therapeutics**), and diabetes (**Omada Health**), among others.



Endeavor RX

Yet at the forefront of innovation, a new class of therapeutics is emerging: *Immersive Therapeutics*. These prescribed virtual reality experiences (or video games) have recently gained breakthrough designations from the FDA, and are redefining the digital health landscape. **RelieVRx** provides an “*at-home immersive reality pain treatment indicated as adjunctive treatment for chronic lower back pain.*” The 8-week program guides patients through a curriculum developed around pain management techniques and skills that treat pain in the real world. Similarly, **EndeavorRx** is the only doctor-prescribed video game treatment for children with ADHD, accessible from any mobile device or tablet.

After two months of treatment, 68% of parents reported improvement in ADHD-related impairments according to a study.

Immersive and digitally based treatments are ushering the next era of healthcare, one that brings patient centricity and highly personalized care to a whole new level.

TRAJECTORY 01 Automation Disruption

The adoption of AI continues to make its way through the industry by securing lofty valuations and venture capital deals. Fifty-six percent (56%) of healthcare and life sciences business leaders report that AI initiatives have delivered more value than expected for their organization. Emerging players like **Navina**, a company developing AI-powered assistant software for physicians, are tackling the complex integration of electronic health records. **Diagnostic Robotics** is looking at a larger systemic disruption with their medical-grade AI triage and clinical predictions platform, a comprehensive solution that seeks to massively reduce the cost of care and optimize clinical ROI. And a major partnership agreement between pharma's Novo Nordisk and tech's Microsoft boosts drug discovery research and guarantees that AI will remain a key strategic priority in 2023.



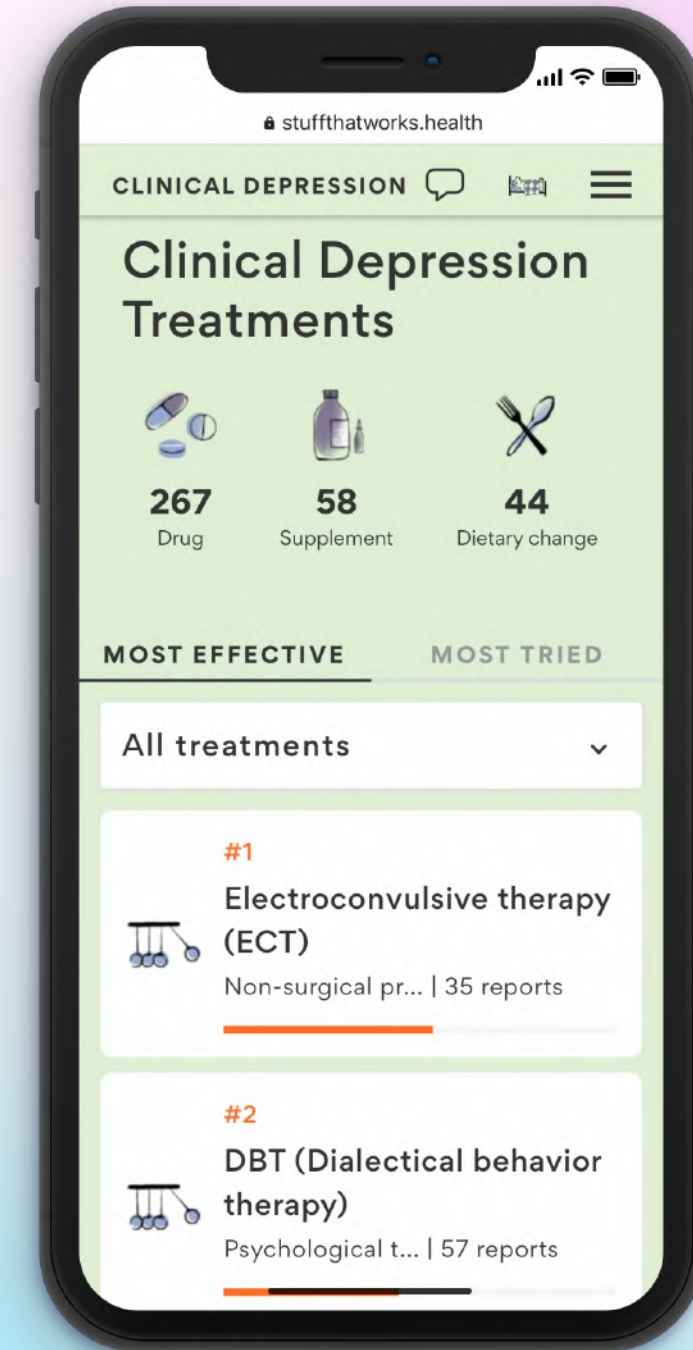


TRAJECTORY 02 Care Anywhere

Tech giants and startups are advancing new models of care delivery. Testing kits have already seen the biggest uptake with COVID, but companies like **Everlywell** are expanding their reach to include fertility, food allergies, genetics, and sexual health tests right from the privacy of your home. In the product category, **TomorrowHealth** offers comprehensive solutions for most of the home-based care people need, including coordinated medical supplies (oxygen tanks, tension meters) delivered by providers on behalf of patients. The direct-to-consumer (DTC) health model is on the rise as the industry moves toward a responsive, decentralized, and digital-first approach to preventive care.

TRAJECTORY 03 Crowdsourced Health

The journey from diagnosis to treatment for many patients is usually riddled with uncertainty, apprehension, and stress. People spend thousands of hours online on patient forums and other websites, researching first-hand experiences about specific drugs and treatments. Making sense of all these data is a major undertaking. Fortunately, **StuffThatWorks** is building the biggest patient-reported knowledge database for chronic conditions. By crowdsourcing patient-recorded outcomes and applying natural language processing and machine learning AI to these data, the StuffThatWorks team delivers valuable insights to its community. So far, the platform has over 3 million members; 19K doctors, and 97 million data points.



Future Points & Percentages

440M

consumer health +
wellness wearables
worldwide by 2024

DELOITTE

150+

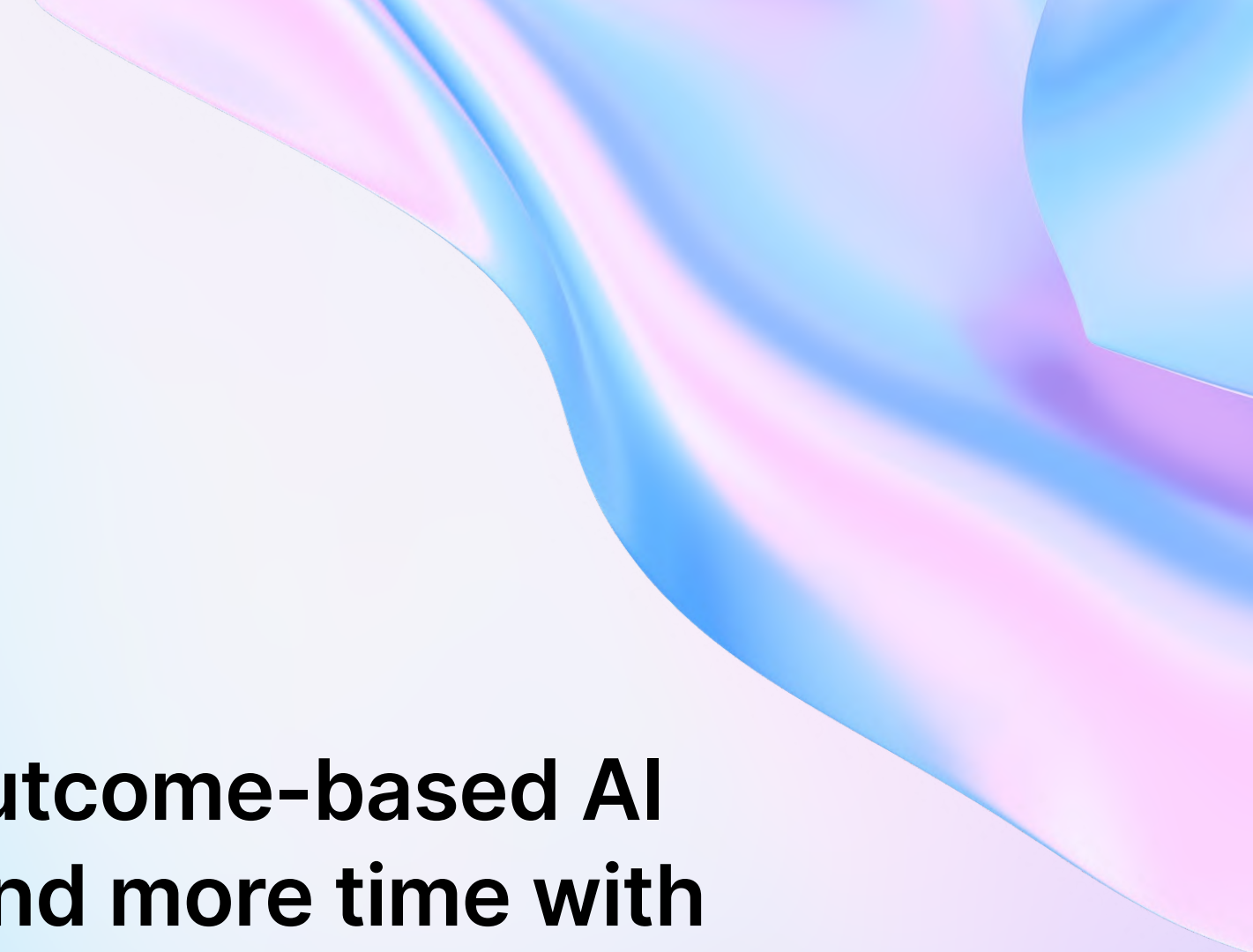
digital therapeutics and
digital care products were
available as of 2021

IQVIA

6 years

span for AI healthcare
growth from \$5B in 2020
to \$45B in 2026

MARKETSandMARKETS



"Together we will usher in a future of outcome-based AI where healthcare professionals can spend more time with patients and less time on documentation."

SATYA NADELLA, CHAIRMAN & CEO, MICROSOFT

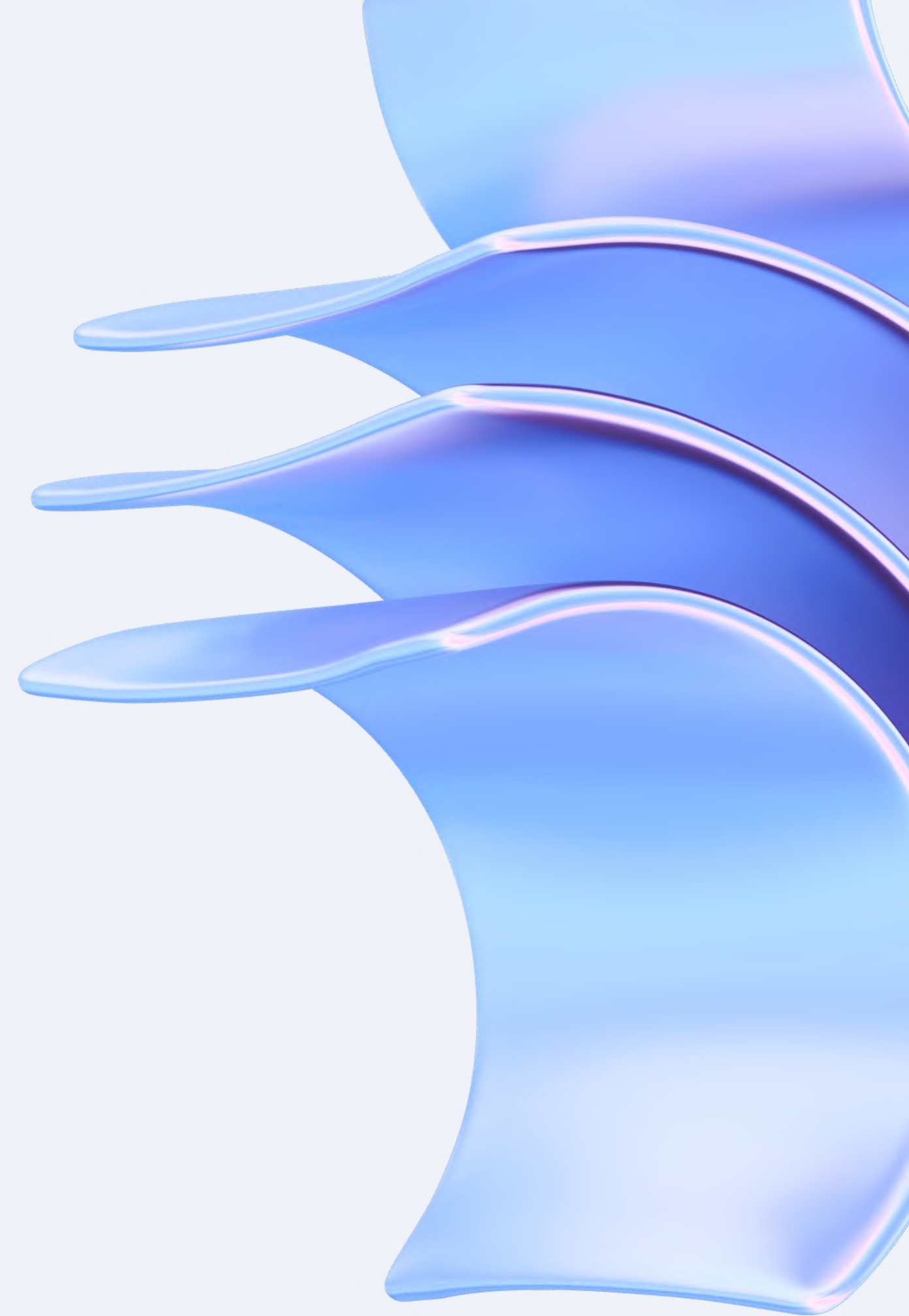
Path/s Forward

Evaluate your current ecosystem through the lens of connected health. Are there opportunities to optimize the delivery of care for your patients? Can you extend your brand's presence with virtual health concierges? Can you empower healthcare providers by offering smarter diagnosis predictions through data?

The quantification of health means an immense amount of data are about to become accessible, but they still need to be deciphered. Brands and providers can remain relevant by helping users make sense of all the metrics, leveraging the knowledge toward habit formation and behavioral change—as well as improving the treatment experience for many chronic conditions.

TAKEAWAY

Health and wellness brands that continue to invest in their digital readiness will be prepared to navigate the evolving landscape of human-centric care.



REFERENCES

Beyond Wellbeings

[The Body Joyful](#), by Anne Poirier.

[Return on Disability: Design Delight from Disability](#), published by Rod Group.

[Diversity in High Tech](#), published by the U.S. Equal Employment Opportunity Commission.

[Disability and Health](#), published by the World Health Organization.

[The WebAIM Million](#), published by WebAIM.

[Rest is Resistance, A Manifesto](#), by Tricia Hersey.

[How Brands Can Thrive In The Direct To Avatar Economy](#), by Cathy Hackl.

[Affirmative Avatars Market](#), published by The Future Laboratory.

Intake + Uptake

[North America Sleep Tech Devices Market size](#), published by Graphical Research.

[The Beverage Edition: Challenges in Functional Beverages](#), published by Imbibe Drink Tank.

[Food and Health Survey 2021](#), published by IFIC.

[Still Feeling Good: the US wellness market continues to boom](#), published by McKinsey and Company.

[Food and Agriculture Organization of the United Nations](#), published by International Year of Soils.

[Agriculture's connected future: How technology can yield new growth](#), published by McKinsey and Company.

REFERENCES

Seek to Peak

[Guide to Sexual Concerns and Pleasure](#), published by The National Coalition for Sexual Health.

[Sexual health, human rights and the law](#), published by the World Health Organization.

[US Sexual Wellness Market Size](#), published by Grandview Research.

[Sex Therapy for the 21st Century: Five Emerging Directions](#), published by the American Psychological Association.

[Sex Hormones](#), published by the National Library of Medicine.

Mindful Expansion

[Building Better Experiences](#), published by Wunderman Thompson.

[The Experience Economy](#), by B. Joseph Pine II and James H. Gilmore.

[Up to My Eyeballs in Art at Superblue](#), by Arthur Lubow.

[The Psychedelic Drugs Market](#), published by Research and Markets.

[Oregon Psilocybin Services](#), published by Oregon Health Authority.

[Psychedelic Medicines Are Expanding into The Public Consciousness](#), by Natasha Loder.

[Counterpoint Global Insights: Psychedelics](#), published by Morgan Stanley Investment Management.

[US AR/VR Users, 2019-2013](#), published by eMarketer | Insider Intelligence.

REFERENCES

Transformative Spaces

[Good Start to the Year](#), published by LVMH Moët Hennessy Louis Vuitton.

[How Can Shopping Malls Be Accessible to People With Disabilities?](#), published by Inclusivity City Maker.

[US Retail Showing Consumer Standing Firm in Face of Inflation](#), published by Bloomberg.

[Wellness Architecture and Design Initiative Trends](#), published by the Global Wellness Institute.

Autonomous Self

[The Future of Digital Health](#), published by BCG Digital Ventures.

[Digital to the Core: 2022 KPMG U.S. Technology Survey Report](#), published by KPMG.

[Wearable Technology in Health Care: Getting Better All The Time](#), published by Deloitte.

[Digital Therapeutics: DTx Market Trends and Companies in the Growing Digital Health Industry](#), published by eMarketer | Insider Intelligence.

[State of Digital Health Q3'22 Report](#), published by CBInsights.

[Virtual Reality Therapy: Everything You Need to Know](#), by Emily Laurence.

At Havas Health & You, we keep health and wellness brands fresh—amplifying their human purpose through immersive and experiential ideas with the power to change lives. Thanks for joining us on a trip into the emerging trends redefining health, wellness, and beyond.

Check our sources and sample our learnings in your work. We can deliver our research to your business in a number of ways from in-house presentations to strategic workshops and bespoke reports—**just reach out.**

EMAIL

NYnewbiz@havas.com

HAVAS
HEALTH
& YOU

CONTRIBUTORS

Christen Casey, Strategy Lead, Havas Mango

Laura Santana, Experience Strategy Lead, Havas Mango

Tristan Stevens, Associate Managing Director, Havas Mango

Kevin Zengel, Associate Creative Director, Havas Mango

Melody de Zendegui, Senior Integrated Producer, Havas Mango

Aly Lopez, Design Director, Havas Mango

